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August 1991

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STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

State: Pennsylvania

MORE LIBERAL METHODS OF TREATING RESOURCES
UNDER SECTION 1902(r)(2) OF THE ACT

☐ Section 1902(f) State

☒ Non-Section 1902(f) State

(A) AFDC-related

- (1) Lump Sum - For AFDC-related categorically needy nonmoney payment and medically needy only applicants/recipients, except where the person chooses to have the receipt of a lump sum treated as income because that is advantageous to the person, a lump sum will be treated as a resource and combined with all other resources in determining eligibility.

TN No. 91-33

Supersedes

TN No. 88-05

Approval Date 2/25/1993

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MORE LIBERAL METHODS OF TREATING RESOURCES
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☐ Section 1902(f) State

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(A) AFDC-related

- (2) Resource Timing - For AFDC-related categorically needy nonmoney payment and medically needy only applicants/recipients, resources are evaluated as of the date of application/reapplication and as of the date there is a change in those resources. An applicant/recipient is ineligible for MA on the date that his resources exceed the MA resource limit for the appropriate MA Program and he remains resource ineligible until his resources are equal to, or less than, the resource limit. **EXCEPTION:** A person is not ineligible if the resources are reduced to the appropriate MA resource limit within the required 10-day advance notice period and, when applicable, fair consideration is received.

TN No. 91-33

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TN No. 90-21

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STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

State: Pennsylvania

MORE LIBERAL METHODS OF TREATING RESOURCES
· UNDER SECTION 1902(r)(2) OF THE ACT

☐ Section 1902(f) State

☒ Non-Section 1902(f) State

(A) AFDC-related

- (3) Life Insurance - For AFDC-related categorically needy nonmoney payment and medically needy only applicants and recipients, the cash value of life insurance is excluded if the face value of the life insurance owned by each applicant/recipient does not exceed \$1,500 for each insured person. If the face value per insured person exceeds \$1,500, then the cash value not to exceed \$1,000 is excluded.
- (4) Motor Vehicles - For AFDC-related categorically needy nonmoney payment and medically needy only applicants and recipients, one motor vehicle is excluded regardless of value. Additional motor vehicles are counted at their equity value.

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STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

State: Pennsylvania

MORE LIBERAL METHODS OF TREATING RESOURCES
UNDER SECTION 1902(r)(2) OF THE ACT

☐ Section 1902(f) State

☒ Non-Section 1902(f) State

(B) Aged, Blind, and Disabled (SSI-Related)

- (1) Property Used in Trade or Business - For SSI-related categorically needy nonmoney payment and medical needy only applicants/recipients, the applicant's/recipient's equity interest in property used in a trade or business essential to self-support is excluded, subject to a maximum of \$15,000. The exclusion is applicable only if the property produces an annual net return of at least 6% of the excludable equity value.

NOTE: The Omnibus Budget Reconciliation Act of 1989, Pub. L. 101-239, removed the limit on the value of property used in a trade or business which can be excluded as a resource for the SSI cash program.

- (2) Joint Bank Accounts - For SSI-related categorically needy nonmoney payment and medically needy only applicants/recipients, joint bank accounts are treated as a resource in accordance with the Multiple-Party Accounts Act of Pennsylvania, 20 Pa. C.S.A. §6301, et seq. Joint bank accounts are considered owned by the several owners in proportion to their contributions to the account, unless a contrary intent is indicated. This policy is neither less restrictive nor more restrictive than the SSI policy. Compliance with the Multiple-Party Accounts Act of Pennsylvania is SSI policy in Pennsylvania by virtue of an order of the U.S. Court of Appeals for the Third Circuit in Cannuni v. Schweiker, 740 F.2d 260 (1984).
- (3) Automobile - For SSI-related categorically needy nonmoney payment and medically needy only applicants/recipients, one automobile is excluded regardless of value.
- (4) Life Insurance - For SSI-related categorically needy nonmoney payment and medically needy only applicants/recipients, the life insurance owned by the applicant/recipient, up to a maximum face value of \$1,500 for each insured person, is excluded. If the life insurance of the insured person has a total face value in excess of \$1,500, only the cash surrender value in excess of \$1,000 is considered a resource.

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STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

State: Pennsylvania

MORE LIBERAL METHODS OF TREATING RESOURCES
UNDER SECTION 1902(r)(2) OF THE ACT

☐ Section 1902(f) State

☒ Non-Section 1902(f) State

(B) Aged, Blind, and Disabled (SSI-Related) (Continued)

- (5) Resource Timing - For SSI-related categorically needy nonmoney payment and medically needy only applicants/recipients, resources are evaluated as of the date of application/reapplication and as of the date there is a change in the resources. Resource changes in the month have no effect until the following month's resources determination. **EXCEPTION:** A person is not ineligible if the resources are reduced to the appropriate MA resource limit within the required 10-day advance notice period and, when applicable, fair consideration is received.

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WAFER PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

State: PENNSYLVANIA

MORE LIBERAL METHODS OF TREATING RESOURCES
UNDER SECTION 1902(f)(2) OF THE ACT

☐ Section 1902(f) State ☒ Non-Section 1902(f) State

For individuals under age 21 described at §1905(a)(i), caretaker relatives described at §1905(a)(ii), and pregnant women described at §1905(a)(viii) who are optional categorically needy individuals under §1902(a)(10)(A)(i) or medically needy individuals under §1902(a)(10)(C)(III):

1. Disregard all resources.

For qualified pregnant women and children eligible (using AFDC income and resource requirements) under §1902(a)(10)(A)(i)(III):

1. Disregard all resources.

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